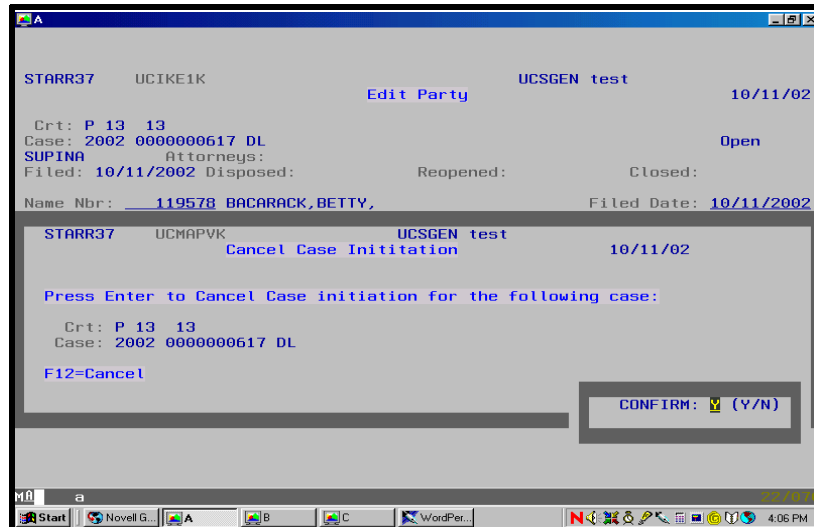# Cancel Case Initiation

The case initiation process may be cancelled at the edit party screen by pressing <F23>.

This will delete any information that has been defined for this case number.

Press <Enter> to confirm.

Notice of Hearing Event

Evt:	"NOH" Notice of Hearing	Dte:	Event date

Pgm/Rslt: Select the program result necessary to bring in text stating the nature of the hearing

Form: Enter form number PC 562

Schedule Next Action:

Next   Type of hearing code (<F4> Prompt for options)

Date   Date hearing is scheduled

Time   Time of hearing

Jur.   Defaults to Jurist of record, need to complete only if different

Ctm.   Defaults to Jurist's courtroom (as defined in professional file), need to complete only if different

Cmt.   Additional comments regarding the scheduled hearing, will only appear on calendar

        Press <ENTER>

Form Generation - PC 562 - Notice of Hearing

Next Action information will be automatically added to the jurist's calendar and the form processing will begin.

```
A                                                                    _ | 8 | X |
STARR37     UCN4PVK                       Rel Mar02  Calhoun-JISP13DB03:P13PCSDB03
                               PROBATE NOTICE OF HEARING                10/30/02
                               PC 562
  Crt: P 13  13                                               Copies: _1
Case: 2002 0000001425 GA CANDICE CALHOUN                      Open
 Jur: HARTER      Filed:  1/22/2002 Disposed:          Reopened:

  TAKE NOTICE: A hearing will be held on   2/25/2002 at   9:00 A M,

  at JUSTICE CENTER, BATTLE CREEK            before PHILLIP E. HARTER     24309

  for the following purpose(s): X state the nature of the hearing

  PETITIONER NAME:  CALVIN CALHOUN_____  (Prompt for list)
          Attorney:   30598  RICHARD A. SANTONI

  The law provides that you should be notified of this hearing. Unless the
  check box below is marked, you are not required to attend the hearing, but
  it is your privilege to do so.
          X You are required to attend this hearing.

F3=Exit  F10=Name  F13=Cmds  F16=Calc  F21=Print

MA        a                     MW                                        04/078
Start  Novell Gr...  A      B      C    WordPerfec...  N  3:38 PM
```

Complete:

Number of copies to be printed

"X", if marked <press enter> comment screen will appear to state the nature of the hearing (If program/result entered the text will be display for completion)

Petitioner
Name: Prompt and select the petitioner's name, the party's attorney information will be automatically updated.

"X"   Mark if all parties receiving notice are to attend the hearing

Press <F21>

Form will generate and create an event of "Form Generated Notice of Hearing"

Proof of Service Event

```
A                                                                    _|8|x|

STARR37     UCIXE1K                    Rel Mar02  Calhoun-JISP13DB03:P13PCSDB03
                                       Edit Event                    10/31/02
 Crt: P 13  13
Case: 2002 0000001425 GA CANDICE CALHOUN                            Open
          Attorneys: CAMPBELL
HARTER       Filed:  1/22/2002 Disposed:          Reopened:

Evt: POS  Dte: 01252002    Plea: ____   Dsp: ____  Pgm/Rslt: ___ _ Monetary: _
Pty: ___ ___   Cnt: __    Attny: _____   Jur: J  24309   Due Dte: _____
Cmt: ___ _____
Form: PC  564█  Register: _____   Receipt: _____   Amount: _____




Schedule Next Action:
Next: ____  Date: _____  Time: _____ _   Jur: _ _____      Ctrm: _____
 Cmt: _____

F3=Exit  F10=Name  F13=Cmds  F14=More Comments  F16=Calc  F20=Bonds
```

Event: POS "Proof of Service"

Date: Event date

Form: PC 564

Press <ENTER>

Select Parties for Reporting on Proof of Service
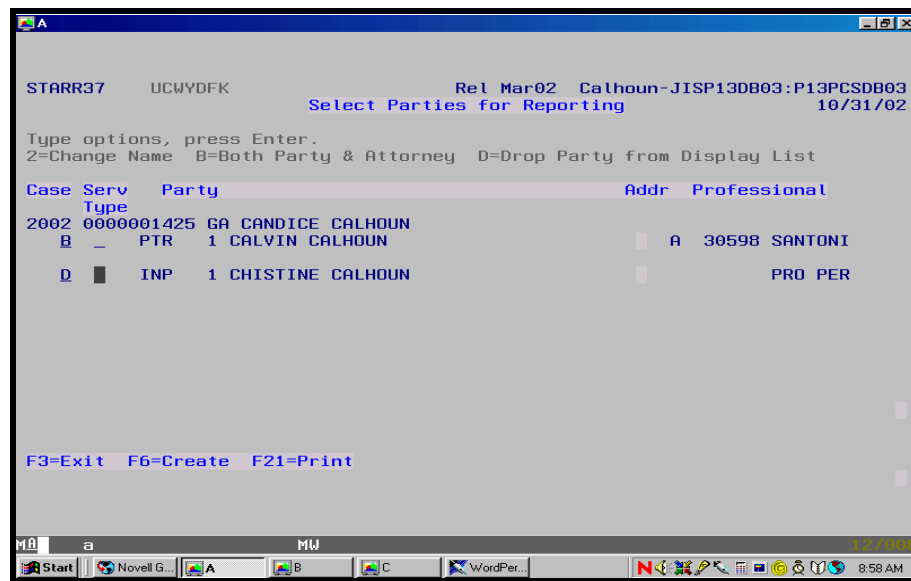
Step 1

Options

B   Designates that "Both" the party and their attorney received the notice

D   Designates that the party is to be "Dropped" they will not receive notice

Press <ENTER>   This step may be by passed if no adds or drops are necessary

Step 2

Select Service Type - Proof of Service by:

P   Personal

N   Non Service

M   Mail

Press <ENTER>

Press <F21>

Step 3 - **Proof of Service Generating the Form**

```
A                                                                        _ ð X
 STARR37      UCY1E1K                      Rel Mar02  Calhoun-JISP13DB03:P13PCSDB03
                                        Proof of Service                  10/31/02
               PC 564
 Court: P 13  13                                       Copies: _1 Page 1 of 1
 Case: 2002 0000001425     CANDICE CALHOUN                            Open
              Attorneys: CAMPBELL
  Jur: HARTER      Filed:  1/22/2002 Disposed:         Reopened:
  Name of the papers served or mailed: Notice of Hearing
  _____
  X 2. I served by  X ordinary mail  _ registered mail  _ certified mail
        the papers described above on:

  X 3. I served by personal service the papers described above on:

  _ 4. After diligent search and inquiry, I have been unable to find and serve
        the following interested persons:

  I have made the following efforts in attempting to serve process: _____
  _____
    Date: 10/31/2002   Signature Starr Wieber_____

 F3=Exit  F10=Name  F13=Cmds  F16=Calc  F21=Print
```

Complete title of document(s) that were served

Complete the applicable type of mail service for #2, or comments regarding efforts to serve process for #4

Date   Defaults to current date

Signature - Clerk's name processing the Proof of Service

Press <F21>

If applicable continue with

Evt "PUB" Publication of Notice of Hearing

Form PC 563

Hearing Event

```
A                                                                    _ □ ×

STARR37    UCIXE1K                    Rel Mar02  Calhoun-JISP13DB03:P13PCSDB03
                                      Edit Event                      10/31/02
 Crt: P 13   13
Case: 2002 0000001425 GA CANDICE CALHOUN                             Open
         Attorneys: CAMPBELL
HARTER      Filed:  1/22/2002 Disposed:            Reopened:

Evt: HRG   Dte:  2/01/2002  Plea: ____   Dsp: ____   Pgm/Rslt: ___ _ Monetary: _
Pty: ___ ___    Cnt: __     Attny: _____   Jur: J  24309   Due Dte: _____
Cmt: Determined that Calvin Calhoun would be appoint as Guardian _____
Form: █__  _____   Register: _____   Receipt: _____   Amount: _____




Schedule Next Action:
Next: ____ Date: _____ Time: _____ _   Jur: _ _____           Ctrm: _____
 Cmt: _____
      _____

F3=Exit  F10=Name  F13=Cmds  F14=More Comments  F16=Calc  F20=Bonds

MA    a              MW              A                        11/008
 Start  Novell G.. A      B    C   WordPer...   N{ }    ⊞ ◎ ö () ⊗ 11:03 AM
```

Event: HRG "Hearing"

Cmt: Any additional comments regarding the hearing

Press <Enter>

Order Appointing Guardian

☞   Adjudication

> •   Event that contains a disposition type and a disposable party
>
> •   Counted on Caseload Part 2 - Method of Disposition - Sections A, C & D

```
┌─A─────────────────────────────────────────────────────────────[_][□][X]─┐
│                                                                          │
│                                                                          │
│   STARR37     UCIXE1K                    Rel Mar02   Calhoun-JISP13DB03:P13PCSDB03│
│                                        Edit Event                10/31/02 │
│    Crt: P 13   13                                                        │
│   Case: 2002 0000001425 GA CANDICE CALHOUN                      Open     │
│           Attorneys: CAMPBELL                                            │
│   HARTER      Filed:  1/22/2002 Disposed:           Reopened:            │
│                                                                          │
│   Evt: OAG_  Dte: _2/02/2002 Plea: ____  Dsp: GTD_  Pgm/Rslt: ___ _ Monetary: _│
│   Pty: HDR __1    Cnt: █    Attny: _____   Jur: J _24309  Due Dte: _____│
│   Cmt: _____  │
│   Form: ___ _____   Register: _____   Receipt: _____   Amount: _____│
│                                                                          │
│                                                                          │
│                                                                          │
│                                                                          │
│   Schedule Next Action:                                                  │
│   Next: ____  Date: _____  Time: _____ _   Jur: _ _____    Ctrm: ____│
│    Cmt: _____ │
│                                                                          │
│   F3=Exit  F10=Name  F13=Cmds  F14=More Comments  F16=Calc  F20=Bonds     │
│                                                                          │
│                                                                          │
│ MA   a          MW                                              09/023    │
│ Start │ Novell Grou... │ A │ B │ C │ WordPerfec... │ N ...        1:29 PM │
└──────────────────────────────────────────────────────────────────────────┘
```

Evt: OAG "Order Appointing Guardian"

Dte: Date of order

Dsp: GTD "Granted"

Pty: HDR 1 "Header"   (Header is the only disposable party on a probate case)

Press <Enter>

☞   After an event disposing the header party these changes should occur

> •   A disposed date on the case header will be displayed
>
> •   The case status will change from Open to Adjudicated

Acceptance of Appointment

```
A                                                                    _ 8 X

 STARR37    UCIXE1K                      Rel Mar02  Calhoun-JISP13DB03:P13PCSDB03
                                         Edit Event                     11/06/02
  Crt: P 13   13
 Case: 2002 0000001425 GA CANDICE CALHOUN                              Adjudicat
             Attorneys: CAMPBELL
 HARTER       Filed:  1/22/2002 Disposed:  2/04/2002 Reopened:

 Evt: AOA   Dte: 02042002   Plea: ____  Dsp: ____  Pgm/Rslt: ___ _ Monetary: _
 Pty: GDN 1▮    Cnt: __    Attny: _____  Jur: _ _____  Due Dte: _____
 Cmt: _____
 Form: ___ _____   Register: _____   Receipt: _____   Amount: _____




 Schedule Next Action:
 Next: ____ Date: _____ Time: _____ _   Jur: _ _____         Ctrm: _____
  Cmt: _____
       _____

 F3=Exit  F10=Name  F13=Cmds  F14=More Comments  F16=Calc  F20=Bonds



 MA     a               MW                                           09/012
 Start   Novell G... A      B      C      WordPer...    N         10:53 AM
```

Evt: AOA Acceptance of Appointment

   Dte: Date of acceptance

   Pty: Party type and number, may prompt to select and/or change the fiduciary's party type
           (See page 26 to change party type)

Once the fiduciary party is updated - Set a Bond with the event

   Press <F20> Bond (Shift + F8)

Change Party type (Acceptance of Appointment event continued)

<F4> Prompt on Party field
2 to change party type

Press <Enter>

Change the Party type to
GDN "Guardian"

Y at Party Category
(Guardians must be
designated as over a Person
and/or Estate, other party
types are may be designated
with a category such as
Special/Temporary,
Successor)

<Enter>

Select Party Category(ies) (Person, Estate, Special/Temporary, Plenary, Limited)
<Enter>

Select the fiduciary <Enter>   Return to the event screen, complete event (F20 Bond, if applicable)
<Enter>

Bond Actions <F20> (Acceptance of Appointment event continued)

```
STARR37    UCQNETK                      Rel Mar02  Calhoun-JISP13DB03:P13PCSDB03
                                         Bond Actions                    11/06/02
Cashier:

  Court: P 13   13
   Case: 2002 0000001425
  Count: __

Posted For:     580277 CALHOUN,CALVIN,
Posted By: _____

      Bond:  1 Type: SUR SURETY           Status: C  Balance:           .00


      Act  Action Dt     Amount  Description                      Action
      SET  02042002    30000.00
      ___  _____  _____
      ___  _____  _____
      ___  _____  _____

 F3=Exit  F10=Name  F13=Cmds  F16=Calc
```

Cashier
Enter financial password

Court
Defaults to user's court

Case
Defaults to event's case number

Court
Criminal charge number

Posted for
Defaults to event's party type/number

Bond
Bond number (a person may have multiple bonds)

Type
Enter type of bond (e.g. cash, surety, ten%)

Status
Closed - bond is set or cancelled
Open - Bond has been posted

Balance
Balance of a monetary bond that has been posted.

Act
Enter bond actions as they occur (e.g. Set Bond, Post Bond, Refund Bond)

Action Dte
Enter the date of the action

Amount
Enter the amount of the action

Press <ENTER> and you will returned to the event screen. Once all other information has been processed on the event, press <ENTER> again.

Letters of Authority

•   Sets the qualification/anniversary date for the fiduciary

Evt   LET "Letters of Authority"

Dte   Date of document

Pty   Fiduciary party and number

To Post a Surety Bond with the event

Press <F20> Bonds (Shift + F8)

Post Surety Bond <F20> (Letters of Authority event continued)

Cashier	User's financial password
Posted by	Party's (Fiduciary) name number
Act.	Action of "BSP" Surety Bond Posted
Action Dte.	Date bond posted
Amount	Amount of surety bond posted

Press <Enter>

Returns to Edit Event screen, complete event

Press <Enter>

This will update the bond record and create an additional event of "Surety Bond Posted".

Party Date File

```
┌A─────────────────────────────────────────────────────── _ ▫ × ┐

 STARR37      UCIXE1K                    Rel Mar02   Calhoun-JISP13DB03:P13PCSDB03

   STARR37       UCW2DFK
                      Select Parties for Event
   Case: 2002 0000001425 GA CANDICE CALHOUN                        Adjudica
                    Attorneys: CAMPBELL
   Jur: HARTER  Filed:  1/22/2002 Disposed:  2/02/2002 Reopened:

   Type options, press Enter.
   1=Select  2=Change  5=Display  C=Cases  D=Dates

   Party: ___ ___

    Pty         Name                    Disp Attorney     Anniv Dt
   D GDN   1    CALHOUN,CALVIN,                SANTONI,RI R  2/05/2002
   ■ HDR   1    CALHOUN,CANDICE,          GTD  CAMPBELL,J R
   _ INP   1    CALHOUN,CHISTINE,



   F3=Exit  F6=Create  F17=Top  F18=Bottom


 MA   a              MW                                          10/00/
 Start  Novell Grou..  A       B       C    WordPerfec..  N...           4:04 PM
```

<F4> prompt at the party field, then D next to the party, will display fiduciary filing dates, etc.

Events will be listed in chronological order and will assist in tracking probate report requirements

```
┌A─────────────────────────────────────────────────────── _ ▫ × ┐

 STARR37      UCIXE1K                    Rel Mar02   Calhoun-JISP13DB03:P13PCSDB03

  STARR37      UCRTDFK      Rel Mar02  Calhoun-JISP13DB03:P13PCSDB03
                   Display Party Dates               10/31/02
   Court: P 13   13

    Case: 2002 0000001425 GA CANDICE CALHOUN

   Party: GDN   1 CALHOUN,CALVIN,

                                          Evt
   Category      Event Description       Nbr  Event Date  Due Date
   ANNIVERSARY   LETTERS OF AUTHORITY    11   2/05/2002
   PARTY ACTION  LETTERS OF AUTHORITY    11   2/05/2002
   QUALIFICATION LETTERS OF AUTHORITY    11   2/05/2002



   F3=Exit


 MA   a              MW                                          03/00
 Start  Novell Grou..  A       B       C    WordPerfec..  N...           4:05 PM
```

Events Listed in the Party Date File

- Qualification Date
- Anniversary Date
- Inventory
- Annual Account
- Annual Report
- Notice of Continued Administration
- Party Actions (e.g. Extensions)

Inventory Events

CA, CY, DD, GA, GM	DA Must create a financial order	DE Must create a financial order
INVF Inventory Filed (amount required) INVZ Inventory Value Zero (no amount required)	INVF Inventory Filed (amount required) INVZ Inventory Value Zero (no amount required)	INVF Inventory Filed (amount required) INVV Inventory Value (amount required) INVZ Inventory Value Zero (no amount required)

Evt: Inventory code

Monetary: Enter "Y", if applicable, process for creating financial order

Pty: Party responsible for filing the inventory
             (only one inventory per case, unless reopened)

Amount: Value of inventory, if other than zero

Press <ENTER>

Create Inventory Financial Order
(Inventory event continued)

```
B                                                                    _ □ ×

STARR37    UCHQEFK                              UCSGEN test
                        Edit Monetary Orders                 12/09/02
Court: P 13  13 Case: 2002 0000001430 DA CHESTER CALHOUN
HARTER       Attorneys:                        Inv Fee:       425.00

Event: INVF  11/05/2002 INVENTY FILD Pty: PR   1  Cnt:  0

Cash       Total    ----Parties----    Begin       End      J/  Balance Fwd
Code       Amount   Respond  Payor     Payment    Payment    S     Paid

PINV   425.00____   PR    1  PR    1   11/05/2002 _____  N  _____
                    Pay Seq: ____1   Periodic Amt: _____   Frequency: _
____  _____    PR    1  PR    1   11/05/2002 _____  N  _____
                    Pay Seq: _____   Periodic Amt: _____   Frequency: _
____  _____    PR    1  PR    1   11/05/2002 _____  N  _____
                    Pay Seq: _____   Periodic Amt: _____   Frequency: _
____  _____    PR    1  PR    1   11/05/2002 _____  N  _____
                    Pay Seq: _____   Periodic Amt: _____   Frequency: _
____  _____    PR    1  PR    1   11/05/2002 _____  N  _____
                    Pay Seq: _____   Periodic Amt: _____   Frequency: _ +


F3=Exit  F10=Names  F13=Cmds  F16=Calc


MA    b                                                          11/014
Start   Novell Grou...   A       B       C     WordPerfec...  N ...  8:18 AM
```

Inv Fee	Displays the calculated inventory amount due
Cash Code	Inventory cash code (this will be based on the cash code your court has created.
Total Amt	Enter the amount due for the inventory fee.
Respond/ Payer	Respondent party (usually HDR) and payer of the amount due, will default to party entered on event screen (usually PR)
Begin date	Date the financial order was created
Balance Fwd Paid	Amount previously paid on the financial order (receipts prior to going on the Trial Court System (TCS)). **Courts not using financial should bring the balance forward when the inventory fee has been paid.**

Press the <Enter> key -
You will be returned to the *Display Financial Orders* screen

You may create a receipt directly from the Display Financial Orders screen by entering a "Z" next to the name and pressing the <ENTER> key.

You will then be returned to the *Case Receipting* screen.

Continue processing your receipt by entering your password, the total paid and amount

Financial Order Receipt

•   Locate financial order(s) by name

•   Enter "Z" next to the name

•   All financial orders for that name within a court will be displayed at the Name Receipting screen
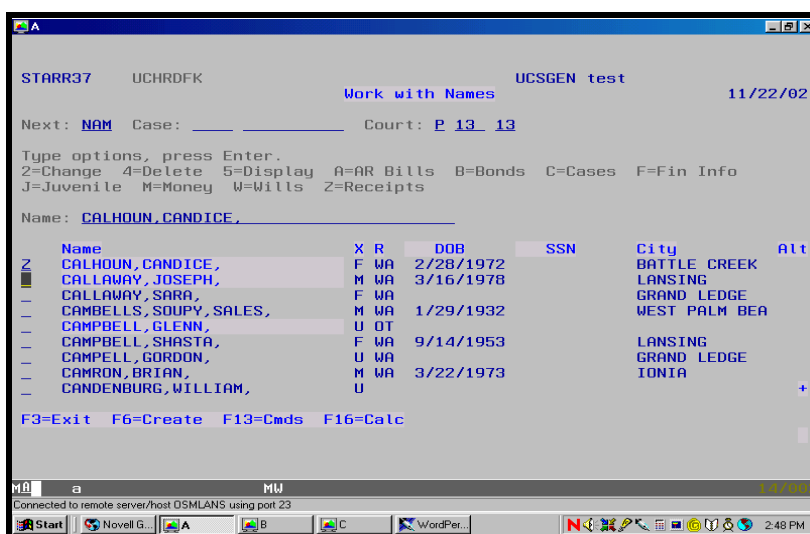
Press <Enter>

Financial Order Receipts continued

- All financial orders for a name within a court will be displayed at the Name Receipting screen

    Cashier   Enter cashier ID

    Total Paid   Enter amount paid

Press <Enter> The total paid will automatically populate the amount paid field

Press <Enter> Confirm Press <Enter>

Financial Order Receipts continued

Complete the following

- Cashier ID   User's financial password

- Paid By   Individual providing payment of the transaction

- Date   Defaults to current date

- Cmt   Additional comments regarding the transaction

- Pymt. Type   Cash, checks, money order, credit card

- Reference
  Code   Check or credit card number

- Amount
  Received   Amount paid for the transaction

  Press <Enter>

Screen will calculate Change Due and ask for confirmation
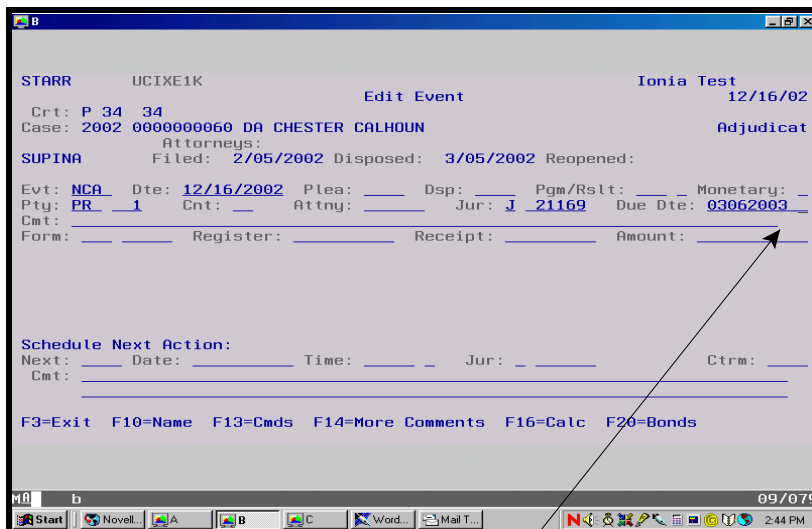
  Press <Enter> - Receipt will print

Annual Filing Events

- Requires a party and a Due Date

CA, CY	DA, DE	DD, GA, GM, GL, LG
ACC Annual Account	ACC Annual Account NCA Notice of Continued Administration (DE & DA case types)	**Guardian Over The Estate** **ACC** Annual Account **Guardian Over The Person** **AGM** Annual Rpt of Guardian on Condition of Minor **AGW** Annual Rpt of Guardian on Condition of Legally Incapacitated Individual **ARPT** Annual Report - Guardianships **RGD** Report of Guardian on Condition of Developmentally Disabled Person **GREV** Guardian Review **OFRG** Order Following Review of Guardianship **RRG** Report on Review of Guardianship of Legally Incapacitated Individual **RRM** Report for Court Review of Minor Guardianship

☛Due date is the Qualification/Anniversary date of the Fiduciary and the year the document is due.

<F4> Prompt on Due Date field to select the party's Anniversary date.

The court must modify the anniversary year, to the year the document is/was due

Prompt on the Due Date will view the Party Date File

```
STARR       UCIXE1K                                    Ionia Test

  STARR       UCW2DFK
                       Select Parties for Event
  Case: 2002 0000000060 DA CHESTER CALHOUN                  Adjudica
                    Attorneys:
  Jur: SUPINA    Filed:  2/05/2002 Disposed:  3/05/2002 Reopened:

  Type options, press Enter.
  1=Select   5=Display   C=Cases   D=Dates

  Party: PR    1

    Pty      Name                        Disp Attorney      Anniv Dt
  _  PR     1 CALHOUN,CHESTER,C,JR                          3/06/2002




  F3=Exit  F6=Create  F17=Top  F18=Bottom
```

Note the Anniversary Date displayed for the Personal Representative

```
STARR       UCIXE1K                                    Ionia Test
                        Edit Event                     11/05/02
  Crt: P 34   34
  Case: 2002 0000000060 DA CHESTER CALHOUN                  Adjudicat
                  Attorneys:
  SUPINA         Filed:  2/05/2002 Disposed:  3/05/2002 Reopened:

  Evt: NCA    Dte: 02252003    Plea: ____   Dsp: _____  Pgm/Rslt: __  Monetary: _
  Pty: PR  1    Cnt: __    Attny: _____   Jur: _ _____ Due Dte: 03062003
  Cmt: ▮
  Form: ___ ____   Register: _____  Receipt: _____  Amount: _____




  Schedule Next Action:
  Next: ____  Date: _____  Time: _____ _  Jur: _ _____     Ctrm: ____
  Cmt: _____
       _____

  F3=Exit  F10=Name  F13=Cmds  F14=More Comments  F16=Calc  F20=Bonds
```

"1" to select *Fiduciary Qualification - Anniversary date is 03/06/2002*

The document's due date should be the same month and day as the Fiduciary's anniversary date, but the year is when the document is or was due = 03/06/2003

Closing Event

☞   Most Cases are counted on caseload when they are closed
        Caseload Part 2 - Method of Disposition - Section A & D

Administratively Closed **Caseload** **Part 2 Sec. A - Estates/Trusts Line 7** **Part 2 Sec. D - Guardian/Conservator Line 7**	Close Case/Out of System **Caseload** **Part 2 Sec. A - Estates/Trusts Line 8** **Part 2 Sec. D - Guardian/Conserv Line 8**
ADC Administrative Closing **MADC** Mem. of Administrative Closing	**CLOC** Close Case **CIC** Certificate of Completion **CHVO** Change of Venue Outgoing **RGW** Receipt of Ward & Discharge **TER** Guardianship Terminated by Court

Evt

Enter the appropriate Closing event code

Press <Enter>

After a closing event the case status will change from Adjudicated to Closed

Reopen Event

☞   Counted on Caseload Part 1, New Filings

DA, DE, PE, MI and CZ are counted on Section A & C, Line 3, Reopened Cases

Guardianships and Conservatorships are counted as a new filings on
Section D, Line 2, New Filings

```
A                                                                            _ |&| X

 STARR37    UCIXE1K                             UCSGEN test
                                          Edit Event                        11/22/02
  Crt: P 13  13
 Case: 2002 0000001429 DE CALVIN CALHOUN                          Closed
            Attorneys:
 HARTER        Filed:  6/22/2002 Disposed:  6/30/2002 Reopened:

 Evt: REO   Dte: 11012002    Plea: ____   Dsp: ____   Pgm/Rslt: ___ _ Monetary: _
 Pty: _____    Cnt: ___    Attny: _____    Jur: _ _____   Due Dte: _____
 Cmt: Application/Petition to Reopen _____
 Form: ___ ____  Register: _____  Receipt: _____  Amount: _____



 Schedule Next Action:
 Next: █ ___  Date: _____  Time: _____ _   Jur: _ _____        Ctrm: ____
  Cmt: _____
       _____


 F3=Exit  F10=Name  F13=Cmds  F14=More Comments  F16=Calc  F20=Bonds


M A    a              M W
Connected to remote server/host OSMLANS using port 23
 Start | Novell G...| A  |  B  | C  | WordPer...|  N  🔊...  4:17 PM
```

Evt   REO "Reopen"

Dte   Date of action/document

Cmt   Reason or name of document causing reopen (Optional)

Pty   Party filing (Optional)

        Press <Enter>

Remember to verify party information

☞   After a reopen event the case status will change from Closed to Adjudicated

Remove Disposition Event

☛ If the disposition is to be counted again on Caseload Part 2, Method of Disposition, the prior case disposition must be removed.

- Event must include disposable party - HDR 1

Evt   RMVD Remove Disposition

Dte   Date of action

Pty   Disposable party (HDR 1 - Probate)

        Press <Enter>

☛ After a remove disposition event the case status will change from Adjudicated to Open and the disposition date will be blank.

Open and Shut Case

Some cases types may be considered an open and shut case (PE cases, for example)

- Processing will begin with case initiation and flow to one event entered with a disposition. (The event will be attached to a closing event category)

- The case may be disposed and closed at the same time.

Evt   PER   Petition and Order for Assignment

Dte   Date of document

Dsp   GTD "Granted" or DEN "Denied"

Press <Enter>

Open/Shut Case - continued

A small screen will pop up displaying the disposable parties on the case and the case disposition
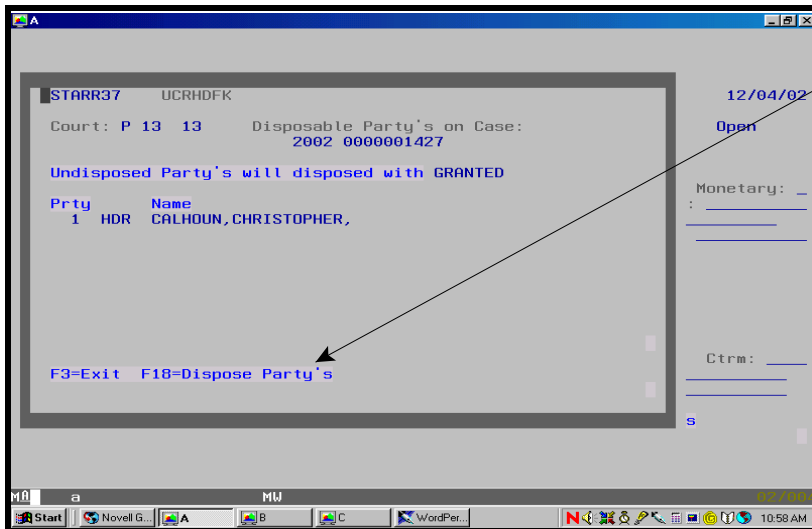
Select <F18> (Shift + F6) to dispose all parties

The case disposition date is displayed and the case status is changed to closed
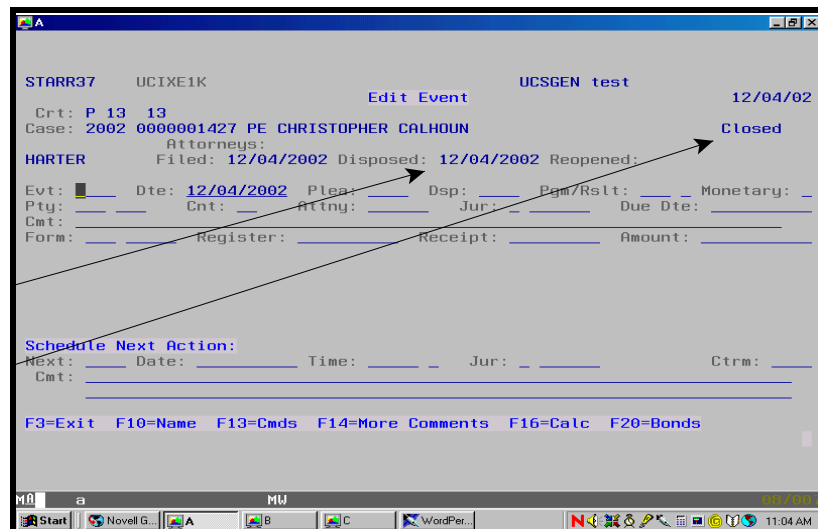
Case Type Change

☛ Counted on Caseload Method of Disposition, Part 2, Section A & D, Line 6.

- Case has not been previously disposed

- Case Type change is by order of the court
  (e.g. Order of Formal Proceedings entered - estate ordered to be supervised,
  box 11 checked, change case type from DE to DA)

Step 1

From the **Work with Cases** screen, enter an "X" - transfer case - next to the case and press <ENTER>

Step 2

Change case type to current type.

<F4> prompt on reason and select Transfer case Type Ordered.

Enter reason for the change (suggested)

Press <ENTER>

Case Type Change continued

It may be necessary to update the Service Type for the new case type. To access the Edit Probate Case screen, enter a "2" to change at the **Work with Cases** screen.

An event is automatically created indicating "Transfer Case Type Ordered and a result of Case Type Change will also be created

Process is counted on Line 6 of the Caseload Report

New case type should be disposed through normal processing

Wills for Safekeeping

- Hop to Edit Event with "**AEV**" with the case number or an "E" next to case number

- Processing for will events will require a party, and will flow to the cash receipt and will receipt

- Caseload will count each Testator party's filed date that falls within a quarter

- Will events

> WSK   Will for Safekeeping
> CLW   Codicil to Last Will and Testement
> WWD   Will Withdrawn

```
 A                                                              _ B X

 STARR37    UCIXE1K                        UCSGEN test
                              Edit Event                        12/02/02
  Crt: P 13   13
 Case: 2002 WILLS      TR WILLS FOR SAFEKEEPING               Adjudicat
         Attorneys:
 SUPINA       Filed:  1/01/2002 Disposed:  1/01/2002 Reopened:

 Evt: WSK _  Dte: 11052002 __   Plea: ____  Dsp: ____  Pgm/Rslt: ___ _ Monetary: _
 Pty: TES ▊__    Cnt: __    Attny: _____   Jur: _ _____   Due Dte: _____
 Cmt: _____
 Form: ___ _____   Register: _____   Receipt: _____   Amount: _____




 Schedule Next Action:
 Next: ____ Date: _____   Time: _____ _   Jur: _ _____        Ctrm: _____
  Cmt: _____
       _____

 F3=Exit  F10=Name  F13=Cmds  F14=More Comments  F16=Calc  F20=Bonds

 MA    a                              A                             09/011
 Start   Novell G... A      B     C     WordPer...    N            11:41 AM
```

Evt   WSK   Will for Safekeeping
Pty   Party type of TES, prompt to create and select party's name number

Wills for Safekeeping continued

```
STARR37    UCIXE1K                          UCSGEN test

  STARR37    UCW2DFK
                   Select Parties for Event
  Case: 2002 WILLS      TR WILLS FOR SAFEKEEPING           Adjudica
                   Attorneys:
  Jur: SUPINA  Filed:  1/01/2002 Disposed:  1/01/2002 Reopened:

  Type options, press Enter.
  1=Select  2=Change  5=Display  C=Cases  D=Dates

  Party: TES ___

   Pty        Name                    Disp Attorney     Anniv Dt
  _ TES   1      ADAM,ANSEL,K
  _ TES   2      TALBOT,DAVID,
  _ TES   3      BACH,KATHERINE,ELIZABETH,
  _ TES   4      DANNON,DANNY,Y
  _ TES   5      GACH,LAURA,                                      +

  F3=Exit  F6=Create  F17=Top  F18=Bottom
```

<F6> to create the party on the case

<F6> to create the name in the name index, then "1" to select

Press <Enter>

```
STARR37    UCIXE1K                          UCSGEN test

  STARR37    UCMMDFK
                   Select Party Name
  Type options, press Enter.
  1=Select  2=Change  5=Display

  Name: CALHOUN,CHARLES,RILEY,

   Name                            Gender  DOB        SSN
  1 CALHOUN,CHARLES,RILEY,           M     2/22/1957  529-09-0900
    CALHOUN,CHESTER,                 M
  _ CALHOUN,COREY,                   M     9/15/1957
  _ CALLAWAY,JOSEPH,                 M     3/16/1978
  _ CALLAWAY,SARA,                   F
  _ CAMBELLS,SOUPY,SALES,            M     1/29/1932
  _ CAMPBELL,GLENN,                  U
  _ CAMPBELL,SHASTA,                 F     9/14/1953            +

  F3=Exit  F6=Create
  Record added.
```

Wills for Safekeeping continued

Prompt <F4> at party number field will automatically assign the next available Testator party number

Press <Enter> adds the party type/number to the case

"1" to select will add the party type/number to the event

Press <Enter>

You will be returned to the Edit Event Screen

Press <Enter>

Will for Safekeeping continued

You will be returned to the Cash Receipts screen.

Complete Cashier ID, Quantity, Cash Code, and Amount Due

Press <Enter>

You will returned to the Edit Payment Information

Complete Cashier ID, Paid By, Comments, Payment Type, Ref. Code, and Amount Received

Press <Enter>

" Y" to Confirm

Press <Enter>

Wills for Safekeeping continued

You will returned to the Edit Will Activity Screen

Enter social security number, if not previously entered on the name.

Prompt to select depositor's name from name index or enter name manually

Press <Enter>

Will receipt prints

Will activity may be viewed by entering a "W" next to the name

Press <Enter>

Will Withdrawn

- Locate individual by name, then C for Cases

- Individual's party type/number will be displayed in the w/w cases screen

- "E" next to the case to access events and <F6> to create

- WWD "Will Withdrawn" event

- On the event, it is important to add or select the individual's correct party type/number

- Once the event is entered, the will activity will be simultaneously recorded for the name selected

- If the individual did not return with their will receipt for completion, one may be printed through Will Activity - "W" next to the name/name index, "P" to Print next to Will

Trust Registration and Wills for Decedents Estates

- •   Trust Registrations and Wills for Decedents Estates fall under the TR case type

- •   TR case types may be filed in an individual file or as a group file

- •   **Party types** with filed dates that fall within the quarter are counted on Caseload

        TR - Trust Registration, must use the party type of "TRU" Trustor
        Part 1, Section A, New Filings, Line 2

        Wills, must use the party type of "TES" Testator
        Part 1, Section B, New Filings, Wills

```
STARR37     UCIKE1K                          UCSGEN test
                              Edit Party                    12/16/02

 Crt: P 13  13
Case: 2002 TRUST REGS TR TRUST REGISTRATION              Adjudicat
SUPINA       Attorneys:
Filed:  1/02/2002 Disposed:  1/02/2002 Reopened:        Closed:

Name Nbr: _____213 SACK,SUSAN,            Filed Date: 12/16/2002
  Party: TRU __8                                  Party Cat? N
 Public: P
 Current Address: 2300 S. CLARETON ROAD       Address Code:   38925

         City: LANSING                   St: MI Zip: 48900
        Phone: 517/347-8989 Ext:    Gender: F  DOB:  7/31/1984 Age:

         SSN: 360-60-1245  DLN:          St: MI

  Attny: _____                      Appt/Ret: _ Notices: _
    Cmt: _____      Alt Names: _
Alternate: ___ Name: _____

F3=Exit  F10=Name  F13=Cmds  F23=Cancel Init

MA   b                                                    10/016
```

Locate current Trust Registration or Wills for Decedents Estate group file

- •   "P" next to the case, to access work/w Parties*
- •   <F6> create Party
- •   Locate party's name in index or <F6> to create, then 1 to select name
- •   Enter appropriate Party Type (see above), <F4> on number field to automatically provide next available party number
- •   Press <Enter>

*Optional - Courts may choose to create an event of TRU or WDE with the party type and number

<u>System Commands</u>

The System Commands Menu is used to work with print jobs and printer outq details.

Press < F13> (Shift + F1)
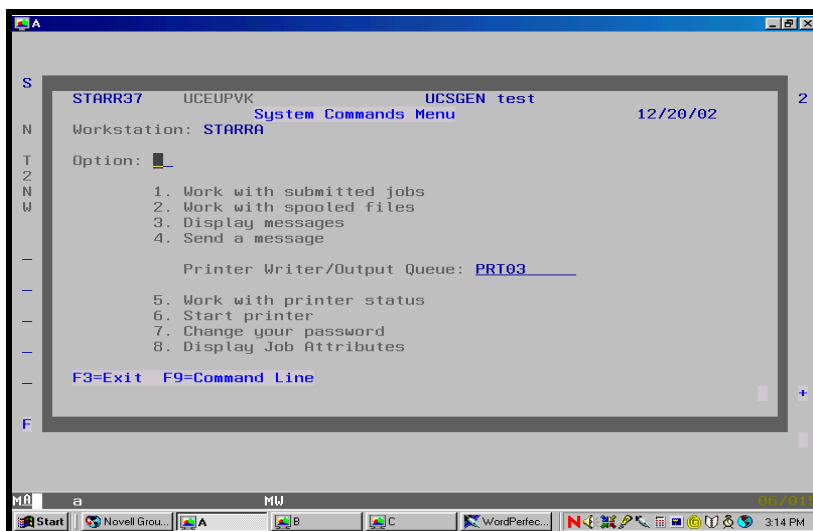
Option: ___

1.   Work with submitted jobs: Displays the job name and status information of a print job

2.   Work with spooled files: Displays all of the spooled files that are currently on the system. Listing of all print jobs with detail information such as status, number of pages, etc.

3.   Display messages: Displays system messages or messages sent from other AS400 users.

4.   Send a message: Allows the user to send a message to one or more users on the system. You can specify whom to send the message to, if you want to interrupt that person, the type of message you want to send, and the text of the message.

            Printer Writer/ Output Queue _____ (indicates the user's assigned printer)

5.   Work with the printer status: Displays all of the attributes and current job information associated with the specified printer writer/output queue.

6.   Start Printer: Starts the user's printer.

7.   Change Password: Allows the user to change their own password, to encourage security.